

SOLICITATION AND OFFER				1. [BLANK]				Page 1 of 19
2. CONTRACT NUMBER		3. SOLICITATION NUMBER <div style="text-align: center;">OPR06000096</div>		4. TYPE OF SOLICITATION <input type="checkbox"/> SEALED BID (IFB) <input checked="" type="checkbox"/> NEGOTIATED (RFP)		5. DATE ISSUED <div style="text-align: center;">08/10/2006</div>		6. REQUISITION/PURCHASE NUMBER <div style="text-align: center;">See Lines</div>
7. ISSUED BY AO801 Office of Finance and Procurement, Procurement Division 359 Ford HOB Washington,DC 20515 TEL: (202) 225-2921 ext. FAX: (202) 226-2213 ext.				CODE AO801		8. ADDRESS OFFER TO (If other than item 7)		
NOTE: In sealed bid solicitations "offer" and "offeror" mean "bid" and "bidder".								
SOLICITATION								
9. Sealed offers in original and <u>1</u> copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, or if handcarried, in the depository located in <u>NO HAND CARRIES</u> until <u>2:00 PM</u> local time <u>08/31/2006</u> (Hour) (Date)								
CAUTION - LATE submissions, Modifications, and Withdrawals: See Section L. All offers are subject to all terms and conditions contained in this solicitation.								
10. FOR INFORMATION CALL:		A. NAME Jim Caskey		B. TELEPHONE (NO COLLECT CALLS) AREA CODE NUMBER EXT. 202 226-2108			C. E-MAIL ADDRESS jim.caskey@mail.house.gov	
11. TABLE OF CONTENTS								
(X)	SEC.	DESCRIPTION	PAGE(S)	(X)	SEC.	DESCRIPTION	PAGE(S)	
PART I - THE SCHEDULE				PART II - CONTRACT CLAUSES				
	A	SOLICITATION/CONTRACT FORM			I	CONTRACT CLAUSES		
	B	SUPPLIES OR SERVICES AND PRICES/COSTS		PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACH.				
	C	DESCRIPTION/SPECS./WORK STATEMENT			J	LIST OF ATTACHMENTS		
	D	PACKAGING AND MARKING		PART IV - REPRESENTATIONS AND INSTRUCTIONS				
	E	INSPECTION AND ACCEPTANCE			K	REPRESENTATIONS, CERTIFICATIONS, AND OTHER STATEMENTS OF OFFERORS		
	F	DELIVERIES OR PERFORMANCE			L	INSTRS., CONDS., AND NOTICES TO OFFERORS		
	G	CONTRACT ADMINISTRATION DATA			M	EVALUATION FACTORS FOR AWARD		
	H	SPECIAL CONTRACT REQUIREMENTS						
OFFER (Must be fully completed by offeror)								
12. In compliance with the above, the undersigned agrees, if this offer is accepted within _____ calendar days (60 calendar days unless a different period is inserted by the offeror) from the date for receipt of offers specified above, to furnish any or all items upon which prices are offered at the price set opposite each item, delivered at the designated point(s), within the time specified in the schedule.								
13. DISCOUNT FOR PROMPT PAYMENT (See Section I)			10 CALENDAR DAYS (%)	20 CALENDAR DAYS (%)	30 CALENDAR DAYS (%)	CALENDAR DAYS (%)		
14. ACKNOWLEDGMENT OF AMENDMENTS (the offeror acknowledges receipt of amend - ments to the SOLICITATION for offerors and related documents numbered and dated):			AMENDMENT NO.	DATE	AMENDMENT NO.	DATE		
15A. NAME AND ADDRESS OF OFFEROR		CODE	FACILITY		16. NAME AND TITLE OF PERSON AUTHORIZED TO SIGN OFFER (Type or print)			
15B. TELEPHONE NUMBER AREA CODE NUMBER EXT.		<input type="checkbox"/> 15C. CHECK IF REMITTANCE ADDRESS IS DIFFERENT FROM ABOVE - ENTER SUCH ADDRESS IN SCHEDULE.			17. SIGNATURE		18. OFFER DATE	
AWARD (To be completed by Government)								
19. ACCEPTED AS TO ITEMS NUMBERED			20. AMOUNT		21. ACCOUNTING AND APPROPRIATION			
22. [BLANK] <input type="checkbox"/> [BLANK] <input type="checkbox"/> [BLANK]					23. SUBMIT INVOICES TO ADDRESS SHOWN IN (4 copies unless otherwise specified)		ITEM	
24. ADMINISTERED BY (If other than Item 7)			CODE	25. PAYMENT WILL BE MADE BY				
26. NAME OF CONTRACTING OFFICER (Type or print)				27. U.S. HOUSE OF REPRESENTATIVES (Signature of Contracting Officer)			28. AWARD DATE	
IMPORTANT - Award will be made on this Form or by other authorized official written notice.								

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Line Item Number	Description	CLIN Ref	Delivery Date (Start Date to End Date)	Quantity	Unit of Issue	Unit Price	Total Cost (Includes Discounts)
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CONTRACTOR SUPPORT: PORTFOLIO MANAGEMENT OFFICE

0001	PMO Base Period (1st Year)	0001		0.00	ea	\$ _____	\$ _____
	Contractor Support Est. POP: October 2006-2007 Ref Req No: HAA0000853						
0002	PMO Base Period (2nd Year)			0.00	ea	\$ _____	\$ _____
	Contractor Support Est. POP: October 2007-2008						
0003	PMO Option Period 1 (3rd Year)			0.00	ea	\$ _____	\$ _____
	Contractor Support Est. POP: October 2008-2009						OPTION PERIOD
0004	PMO Option Period 2 (4th Year)			0.00	ea	\$ _____	\$ _____
	Contractor Support Est. POP: October 2009-2010						OPTION PERIOD

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Line Item Number	Description	Delivery Date (Start Date to End Date)	Quantity	Unit of Issue	Unit Price	Total Cost (Includes Discounts)
0005	PMO Option Period 3 (5th Year)		0.00	ea	\$ _____	\$ _____
	Contractor Support Est. POP: October 2010-2011					OPTION PERIOD

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SECTION C -- DESCRIPTIONS AND SPECIFICATIONS

C.1 SECTION C - STATEMENT OF WORK - ATTACHMENT 1

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SECTION D -- PACKAGING AND MARKING

D.1 HC.4.002 PAYMENT OF POSTAGE AND FEES

MAY 2001

All postage and fees related to submitting information, including forms, reports, etc., to the House of Representatives shall be paid by the contractor.

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SECTION F -- DELIVERIES OR PERFORMANCE

F.1 HC.6.001 PERIOD OF PERFORMANCE MAY 2001

Contract period of performance shall extend from award for a base period of two years plus three option periods of one year each.

F.2 HC.6.003 OPTION TO EXTEND THE TERM OF THE CONTRACT MAY 2001

- a. The House may extend the term of this contract up to 3 times for a period of 12 months each.
- b. The total duration of this contract, including the exercise of any options under this clause shall not exceed 5 years

F.3 HC.6.005 NOTICE TO THE HOUSE OF DELAYS MAY 2001

In the event the contractor encounters difficulty in meeting performance requirements, or when he anticipates difficulty in complying with the contract, or whenever the contractor has knowledge that any actual or potential situation is delaying or threatens to delay the timely performance of this contract, the contractor shall immediately notify the customer and the COR by telephone and follow-up in writing to the COR, giving pertinent details; provided, however, that this data shall be informational only in character and that this provision shall not be construed as a waiver by the House of any delivery schedule or date, or any rights or remedies provided under this contract.

F.4 HC.6.008 LIQUIDATED DAMAGES MAY 2001

If the contractor fails to perform the services specified in this contract, or any extension, the House may terminate this contract under the Termination clause of the contract. The contractor shall be liable for fixed, agreed and liquidated damages as provided in Section F "Payment for Non-performance", accruing until the time the House may reasonably obtain delivery or performance of similar services.

The contractor shall not be charged with liquidated damages when the delay in delivery or performance arises out of causes beyond the control and without fault or negligence of the contractor.

F.5 HC.6.009 PAYMENT FOR NON-PERFORMANCE SEPTEMBER 2001

In the event that the contractor fails to perform as stipulated in the statement of work, and such failure is not for a reason beyond the control of the contractor, the House may charge 1% of the total contract cost per day and may obtain performance from another source and charge and collect all costs plus a 15% administrative fee from the contractor.

F.6 HC.6.010 PLACE OF PERFORMANCE JUNE 2002

House Capitol Hill Office Buildings, Washington, D.C.

F.7 TYPE OF CONTRACT

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The House intends to award a Time and Materials contract with a Not to Exceed (NTE) amount for this effort

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SECTION G -- CONTRACT ADMINISTRATION DATA

G.1 HC.7.003 INVOICES

FEBRUARY 2005

a. The Debt Collection Improvement Act of 1996 requires that federal agencies pay recipients by electronic funds transfer (EFT). EFT is an improved, convenient, and secure method of payment. To enable the U.S. House of Representatives to send payments electronically to your financial institution, you must first complete an EFT enrollment form to provide your signature and certain information regarding your financial institution. Please visit the U.S. House of Representatives' Office of Finance and Procurement website at www.house.gov/finance for appropriate forms or call the EFT Help Line at 202-226-2277.

b. A proper invoice shall minimally include:

Contractor Name, Address, and Phone Number

Name of Contractor Point of Contact

House Contract Number

Task/Delivery Order Number (as appropriate)

Invoice Number

Invoice Date

Invoice Page Number (each page of an Invoice shall minimally also contain the contractor Firm name, the invoice number, and the invoice date)

c. And, for each deliverable included on the invoice:

Contract Line Item Number (CLIN)

Period of Performance

Brief Description of Item

Quantity Delivered

Unit Price

Extended Price

Total Price of all deliverables contained on Invoice

Payment Terms, if appropriate (Example: 2% 10 - Net 30)

d. The House does not pay federal, state or local taxes unless mandated by law.

e. All follow-up invoices shall be marked "Duplicate of Original" on all pages. Contractor questions regarding payment information or check identification should be directed to the COR for follow-up with appropriate financial personnel.

G.2 HC.7.007 AUTHORIZED HOUSE REPRESENTATIVES

FEBRUARY 2005

a. Contracting Officer (CO):

Barbara Burkhalter

Associate Administrator, Office of Finance and Procurement

Room 3531 Ford House Office Building

U.S. House of Representatives

Washington, DC 20515

Telephone: (202) 225-1821

Fax: (202) 225-6916

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1. Except as specified in paragraph (3) herein, no order, statement or conduct of House personnel who visit the contractor's facilities, or in any other manner communicate with contractor personnel during the performance of this contract, shall constitute a change (in scope, terms, conditions, requirements, pricing, and/or delivery schedules) under this contract.

2. The contractor shall not comply with any order, direction or request of House Personnel which would constitute a change under this contract, unless issued in writing and signed by the CO, or made pursuant to specific authority otherwise included in this contract.

3. The CO is the only person authorized to approve changes under this contract and, notwithstanding provisions contained elsewhere in the contract, said authority remains solely with the CO. In the event the contractor effects any change at the direction of any person other than the CO, that change shall be considered to have been made without authority and no adjustment in price shall be made in the contract to cover any increase in charges incurred as a result thereof. The CO may delegate certain responsibilities to authorized representatives.

b. Contracting Officer's Representative (COR):

Name: TBD

Title:

Address:

Phone:

Fax:

E - mail:

1. The COR, appointed by the contracting officer, is designated to assist in the discharge of the contracting officer's responsibilities. The responsibilities of the COR include, but are not limited to: determining the adequacy of performance and/or the timeliness of delivery by the Contractor in accordance with the terms and conditions of this contract; acting as the contracting officer in charge of work at the site; ensuring compliance with the contract requirements insofar as the work is concerned; advising the contracting officer and contract administrator of any factors which may cause delays in delivery and/or performance of the work; and conducting or witnessing the conduct of any inspections and/or tests that may be required by the contract. The COR does not have the authority to make any changes to the terms, conditions, requirements, pricing, and/or delivery schedules of the contract or direct the contractor to perform services outside of the scope of the contract.

2. Additional responsibilities of the COR are as follows:

- Monitor and evaluate contract performance, including preparing Vendor Performance Evaluations.
- Review, approve, and process contractor invoices.
- Submit periodic report(s) to the Contract Administrator (CA).
- Provide the CA with notification of intent to exercise options or renewals 90 days prior to expiration date.

c. Contract Administrator:

Name: Jim Caskey

Title: Senior Procurement Specialist

Address: 359 Ford House Office Building
Washington, DC 20515

Phone: 202-226-2108

Fax: 202-226-3850

E - mail: jim.caskey@mail.house.gov

The contract administrator prepares all modifications to the contract, maintains the official contract file with all reports and other contractual documentation, and responds to contractual inquiries or concerns from the COR or contractor on behalf of the CO.

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a. The contractor shall assign key personnel by name and title. The contractor represents that the following individual(s) are key personnel who will provide the services to the House in connection with this contract. At a minimum, the contractor shall designate a program manager as key personnel.

b. For each person, provide the following information: individual's name, title, telephone number, and e-mail address.

c. Except as provided herein, the contractor shall make no substitutions of key personnel unless the substitution is necessitated by illness, death, or termination of employment or requested by the CO. Contractor personnel assigned to this contract as key personnel are subject to approval of the CO. The contractor must notify the CO of changes to key personnel 30 calendar days prior to removal from the contract. Replacement personnel must be accepted in writing by the CO. The CO may require substitution of key personnel from contractor, and may require additional personnel to be added to the project. Proposed substitutes to key personnel must have qualifications equal to or better than those approved at the award stage. The CO will notify the contractor, after receipt of all required information (including resumes of substitutes), of the decision on substitutions within 10 business days.

G.4 HC.7.010 POST AWARD CONFERENCE

FEBRUARY 2005

A post award conference will be held with the contractor to review contract administration issues, unless the House and the contractor determine that such a conference is not necessary.

G.5 HC.7.011 PROGRESSIVE STEPS TO ENSURE SATISFACTORY CONTRACT PERFORMANCE

FEBRUARY 2005

a. The Contractor shall bring all performance issues to the immediate attention of the COR. Likewise, the COR shall bring all real or apparent performance issues to the immediate attention of the Contractor. These issues will be documented and quickly resolved to the mutual satisfaction of both parties, provided such resolution is within the authority of the COR and in accordance with the terms and conditions of the contract.

b. If an issue cannot be resolved between the Contractor and the COR, or resolution would require a modification to the contract, the COR will immediately notify the CA and the CO by e-mail. The CA in conjunction with the COR, Contractor, and as may be required other subject matter experts, will attempt to resolve performance issues to the mutual satisfaction of both parties. If a modification to the contract is required the CA will make a recommendation to the CO and if approved prepare the modification and obtain all necessary approvals and signatures.

c. Issues that cannot be resolved by the CA will be brought to the attention of the CO who may pursue any of the remedies provided for under this contract up to and including termination.

G.6 HC.7.024 REPORTS/PLANS/SCHEDULES

FEBRUARY 2005

All reports, plans, schedules and other submittals provided by the Contractor are subject to approval by the CO or COR.

a. The Contractor is required to perform in accordance with the Government's existing plans and schedules or as directed by the CO or COR until the Contractor's "Deliverables" (submittals) are approved.

b. The Contractor is required to submit deliverables and reports to the CO or COR at specified times throughout the life of this contract which are considered critical to the successful completion of all contractual requirements. The following milestone chart lists deliverables and reports which must be provided by the Contractor at specified due date(s):

MILESTONE CHART FOR CONTRACTOR DELIVERABLES

Item	Due Date	Approval Authority	Reference
0001Report	Weekly/Close of Business Fridays	COR	
0002 Report	Monthly/NLT 15th	COR	

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0003 Report	Quarterly	COR
0004 Report	Annually	COR

G.7 HC.7.025 RELEASE OF CLAIMS

FEBRUARY 2005

After completion of work, and prior to final payment, the contractor shall furnish to the CO, a release of claims against the United States arising out of the contract, other than claims specifically excepted from the operation of the release.

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SECTION H -- SPECIAL CONTRACT REQUIREMENTS

H.1 HC.8.002 IDENTIFICATION BADGES

FEBRUARY 2006

New contractor employees shall obtain a House identification/access pass issued by the House Sergeant at Arms before the employee enters on duty, if unescorted access is required outside of normal public building visiting hours. Public building visitor hours are Monday to Friday 7am to 7pm, and Saturday 7am to 1pm. House identification badges will not be issued to a contractor employee unless the Capitol Police forms for a background check are submitted in accordance with Clause HC.8.003 of this contract.

The contractor shall ensure that the employee surrenders the House identification/access card upon termination of employment or performance is no longer required under this contract. House identification/access cards shall be surrendered to the COR and reconciled within two business days following an employee termination or service release under this contract. A penalty in the form of damages shall be levied for failure to return House identification/access cards in the amount of \$100 a month for each House identification/access card that is not returned to the COR within two business days following an employees termination or employee service no longer required under this contract. The damage amount will be prorated in the month of termination or release from service to the date the House identification/access card was to be returned to the COR and reconciled.

Final payment will not be made under this contract until all House identification/access cards that were issued under this contract have been returned, and a release provided to the contractor signed by the COR. If the contract is a concessionaire type contract, contractor equipment and supplies shall not be removed from House property until all House identification/access cards have been returned and a release provided to the contractor signed by the COR.

H.2 HC.8.003 PROSPECTIVE EMPLOYEE BACKGROUND CHECK

FEBRUARY 2006

a. The U.S. Capitol Police will screen all contractor employees working on this contract who have access to House facilities or information in the performance of Contract work. The COR will provide the Contractor with Capitol Police forms (CP-491 or equal) to be filled out and returned for each employee the contractor will have working in any capacity on the contract. Forms for each employee working on this contract shall be submitted prior to the commencement of work.

b. The employee shall be fingerprinted by the Capitol Police prior to working on the contract and a check made of criminal history records. If the Capitol Police, after having processed the forms, determine at any time that the employee is unsuitable or unfit for assigned duties, they will notify the CAO Human Resources, Director of Administration who will notify the COR and CO. The COR will then direct the contractor to immediately remove that employee from any work under this contract.

c. All contractor employees working on this contract with access to House facilities or information are required to be cleared by the Capitol Police, at a minimum of every three years. However, further background checks may be conducted at any time as is warranted.

H.3 HC.8.005 BENEFITS TO MEMBERS OF CONGRESS

MAY 2001

No Member, Delegate, Resident Commissioner, Officer of the House or Procurement Officer shall be admitted to any share or part of this contract, or to any benefit that may arise therefrom, but this provision shall not be construed to extend to this contract if made with a corporation for its general benefit.

H.4 HC.8.006 NEWS RELEASES

MAY 2001

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No news releases, press conferences or advertisements pertaining to this contract will be made without prior written approval of the CO.

H.5 HC.8.007 AFFIRMATION OF NON-DISCLOSURE AUGUST 2003

Due to the sensitive and confidential nature of information that the contractor may come in contact with during the performance of work at the House, the contractor and all personnel associated with this contract shall sign an "Affirmation of Non-Disclosure" reference House Web Site: <http://www.house.gov/cao-opp/currentsol.htm> prior to commencing work. The Affirmation of Non-Disclosure states in part that the individual signing the form agrees and understands they will not disclose any private or privileged information received in the course of service to the House.

H.6 HC.8.012 SYSTEMS DEVELOPMENT LIFE CYCLE JUNE 2002

House systems are developed in accordance with the attached system development life cycle (SDLC) dated 3/24/99 and approved June 22, 1999 by the Committee on House Administration. The successful offeror shall comply with the applicable sections of the House SDLC in execution of this contracting effort. Reference House Web Site: <http://www.house.gov/cao-opp/currentsol.htm>

H.7 HC.8.013 COMPLIANCE WITH EMERGENCY PROCEDURES MARCH 2003

Any dispute shall be decided by the CO, who shall reduce the decision to writing and mail or otherwise furnish a copy thereof to the contractor. Within thirty (30) calendar days from the receipt of such copy, the contractor may appeal in writing by mail to the CO. The CO's decision shall be final. The contractor may appeal the CO's decision to the Committee on House Administration only for violations by the CO for failure in following procedural guidelines within 30 calendar days of the CO final decision. If no such appeal is taken, the decision of the CO shall be final and conclusive. In connection with any proceeding under this clause, the contractor shall be afforded an opportunity to be heard and to offer evidence in support of its appeal. Pending final decision of a dispute, the contractor shall proceed diligently with the performance of the contract and in accordance with the CO's decision.

H.8 HC.8.022 PAYMENT FOR NON-PERFORMANCE AUGUST 2002

In the event that the Contractor fails to perform as stipulated in the statement of work, and such failure is not for a reason beyond the Contractor, the House may charge 1% of the total contract cost per day and may obtain performance from another source and charge and collect all costs plus 15% administrative fee from the Contractor.

H.9 HC.8.024 INCIDENTAL SERVICES, TRAVEL, AND EXPENSES JUNE 2002

Unless separately priced and awarded, the cost of all local (Washington, D.C. metropolitan area) services, travel, and any other expenses incurred incident to performance of work shall be borne by the contractor.

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SECTION I -- CONTRACT CLAUSES

I.1 HC.9.002 OBSERVANCE OF LAWS MAY 2001

- a. In connection with the performance of work under this contract, the contractor agrees not to discriminate on the basis of race, religion, color, sex, national origin or disability.
- b. The contractor shall comply with all applicable laws of the United States with respect to the conduct of its employees and operations.

I.2 HC.9.003 DISPUTES MAY 2001

Any dispute shall be decided by the CO, who shall reduce the decision to writing and mail or otherwise furnish a copy thereof to the contractor. Within thirty (30) calendar days from the receipt of such copy, the contractor may appeal in writing by mail to the CAO. The CAO's decision shall be final. The contractor may appeal the CAO's decision to the Committee on House Administration only for violations by the CAO for failure in following procedural guidelines within 30 calendar days of the CAO final decision. If no such appeal is taken, the decision of the CO shall be final and conclusive. In connection with any proceeding under this clause, the contractor shall be afforded an opportunity to be heard and to offer evidence in support of its appeal. Pending final decision of a dispute, the contractor shall proceed diligently with the performance of the contract and in accordance with the CO's decision.

I.3 HC.9.004 AVAILABILITY OF FUNDS MAY 2001

The House's obligation under this contract is contingent upon the availability of appropriated funds from which payment for contract purposes can be made. No legal liability on the part of the House for any payment may arise until funds are made available to the contracting officer for this contract.

I.4 HC.9.007 ORDER OF PRECEDENCE MARCH 2002

In the event of an inconsistency between provisions of this contract, the inconsistency shall be resolved by giving precedence in the following order: (a) contract statement of work; (b) other provisions of this contract, whether incorporated by reference or otherwise.

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SECTION K -- REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS

K.1 HC.11.007 ELIGIBILITY FOR AWARD

JULY 2001

The offeror certifies that it is eligible for award of a contract resulting from this solicitation and that it has not been barred, suspended or otherwise rendered ineligible for award of a federal government contract, nor has the offeror within a 3-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, state or local) contract or subcontract; violation of federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property; and, is not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in this provision.

K.2 HC.11.019 SIGNATURE

AUGUST 2002

I certify that these representations, certifications, and other statements are complete and accurate to the best of my information, knowledge, and belief.

NAME OF OFFEROR

DATE

SIGNATURE OF PERSON
AUTHORIZED TO SIGN

PRINTED NAME OF PERSON
AUTHORIZED TO SIGN

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SECTION L -- INSTRUCTIONS, CONDITIONS AND NOTICES TO BIDDERS

L.1 HC.12.002 CONTENT OF PROPOSALS

OCTOBER 2001

Each proposal shall be sufficiently complete and organized to ensure that evaluation can be made on the basis of its content. It is important that the proposal be organized as specified since the score sheet used during the evaluation will parallel the order specified in the solicitation. Offerors are reminded to avoid excessively lengthy or overly extravagant proposals. Proposals that do not address all of the elements and requirements, in the order contained herein, shall be disqualified from further consideration.

The Proposal shall be divided into the following distinct and marked parts:

- (1) "Section A of RFP." The offeror shall insert Section A of this solicitation with all required/applicable blocks completed.
- (2) "Section B Price Schedules." Offeror shall complete Section B and provide a proposed price which will address all requirements as well as others the offeror may wish to offer
- (3) "Section G Contract Administration". Offeror shall complete the required sections of Section G.
- (4) Section K - Representations, Certifications, And Statements of Offerors." Offeror shall complete Section K.
- (5) Management Approach (not to exceed five pages) should specify:
 - a. Offeror's proposed mix of personnel needed to maintain the CAO PMO.
 - b. Offeror's proposed approach toward conducting and maintaining CAO CPIC and Portfolio Management Management practices.
 - c. Offeror's proposed approach toward eliminating potential conflicts of interest arising from the nature of the offeror's impact on business decision related to potential Government procurements.
 - d. In the course of performing this contract, the contractor will necessarily be informed of House plans for future procurements. The House does not intend to exclude the firm awarded a contract under this solicitation from participating in future procurements. However, employees of the successful contractor will be required to execute Affirmations of Non-Disclosure, especially in regards to the future procurements that the contractor employee may encounter while working on this project. Contractor proposals must include the contractor's approach to maintaining confidentiality of procurement-sensitive information and specific approaches to maintaining independence between respective operating and marketing functions or branches.
- (6) Provide pertinent experience and qualification in conducting similar services as stated in the solicitation, and specifically, corporate stability and sound organizational qualities. Demonstrated financial capability sufficient to provide resources to finance day-to-day operations for legislative branch customers. Corporate overviews should not exceed three pages.
- (7) Offeror shall provide references for five current or recent (within three years) customers and five past customer, preferably in the public sector. References should describe engagement, offeror's solution, and up to date contact information for customer point of contact. Corporate experience and qualifications section should not exceed five pages..
- (8) Resumes of proposed individuals. Resumes should include information relevant to the desired qualifications outlined in section 4.5.1. Resumes should not exceed two pages each.
- (9) The offeror shall include proposed staffing approach that addresses the management and timing of staffing decisions for assigning people to the project and removing them from the project. The staffing approach must be definitive enough to provide the House with a clear understanding of how the offeror intends to staff this task order (with Key and non-Key personnel) to successfully meet all the requirements of the statement of work.

L.2 HC.12.003 SUBMISSIONS

MARCH 2004

Offerors shall submit one (1) original hard copy, and one electronic CD version in MS Word/Excel/Project format of the proposal prepared in such format and detail as to enable the House to make a thorough evaluation thereof, and to arrive at a sound determination as to whether or not the offeror can meet the House's requirements. Proposal packages shall be sealed in a suitable container, and all containers shall clearly identify firm name and address and closure date. Proposals shall be submitted to the address shown on Section A. Facsimile proposals will NOT be accepted.

L.3 HC.12.005 DELIVERY OF PROPOSALS - FAX & E-MAIL

OCTOBER 2001

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The House will accept e-mail proposals by the time and date specified in Section A. Late proposals may not be accepted by the CO. Hard copies identical to the email submissions must be received within 5 days of deadline

Proposals may be withdrawn by fax or e-mail received at any time before award. If the solicitation authorizes facsimile proposals, proposals may be withdrawn via facsimile received at any time before award, subject to the conditions specified in the provision entitled "Facsimile Proposals". Proposals may be withdrawn in person by an offeror or an authorized representative, if the representative's identity is made known and the representative signs a receipt for the proposal before award.

L.4 HC.12.007 ACKNOWLEDGEMENT OF AMENDMENTS TO SOLICITATIONS JULY 2001

Offerors shall acknowledge receipt of any amendments to this solicitation requiring bi-lateral signature;

- (1) by signing and returning the amendment,
- (2) by identifying the amendment number and date in the space provided for this purpose on the form for submitting an offer; or
- (3) by letter or telegram if authorized, The contracting officer must receive the acknowledgment by the time specified for receipt of offers.

L.5 HC.12.009 RESTRICTION ON DISCLOSURE AND USE OF DATA JULY 2001

Offerors or quoters who include in their proposals or quotations data that they do not want disclosed to the public for any purpose or used by the House except for evaluation purposes, shall:

- (1) Mark the title page with the following legend:

"This proposal or quotation includes data that shall not be disclosed outside the House and shall not be duplicated, used, or disclosed--in whole or in part--for any purpose other than to evaluate this proposal or quotation. If, however, a contract is awarded to this offeror or quoter as a result of--or in connection with--the submission of this data, the House shall have the right to duplicate, use, or disclose the data, including cost and pricing data, to the extent provided in the resulting contract. This restriction does not limit the House's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets numbered [insert number(s)]," and

- (2) Mark each sheet of data to be restricted with the following legend:

"Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal or quotation."

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SECTION M -- EVALUATION FACTORS FOR AWARD

M.1 HC.13.001 EVALUATION FACTORS FOR AWARD

JULY 2001

Proposals will be evaluated based on the following evaluation factors that are listed in descending order of importance:

- A. Management Approach
- B. Corporate Capabilities and Experience
- C. Past Performance
- D. Cost

The proposal is presumed to represent the offeror's best efforts to respond to the solicitation. Any inconsistency, whether real or apparent between promised performance and price, must be explained in the proposal. For example, if unique and new approaches are the basis for an abnormally low estimate, the nature of these approaches and their impact on price must be explained. Any significant inconsistency, if unexplained, raises a fundamental issue of the offeror's understanding of the nature and scope of the work required. It also may reflect on the offeror's ability to perform the contract within the financial restraints and may be cause for rejection of the proposal. The burden of proof as to price credibility rests with the offeror.

1. Risk Assessment. Price proposals will be evaluated to identify and assess potential risks, which may be inherent in the offeror's approach. The estimated costs to correct any deficiencies in the offeror's proposal will also be evaluated.
2. Price Realism. Proposed pricing will be evaluated not only to determine if the price is reasonable, realistic, and affordable, but also to determine the offeror's understanding of the requirements.
3. Price. Evaluation factors other than price, when combined, are significantly more important than price.

M.2 HC.13.002 CONTRACT AWARD

JULY 2001

- a. The House intends to award a Time and Materials contract with a Not to Exceed (NTE) amount for this effort.
- b. The House may:
 - (1) reject any or all offers, if such action is in its interest,
 - (2) waive informalities and minor irregularities in offers received.
- c. The House intends to evaluate proposals and to award a contract without discussion. Therefore, each initial offer should contain the offeror's best terms. However, the CO reserves the right to conduct discussions if they are later determined to be necessary.

**U.S. House of Representatives
Office of the Chief Administrative Officer (CAO)
Portfolio Management Office (PMO) Support
Statement of Work**

1 Objective

This statement of work (SOW) describes the tasks, skill sets, and deliverables required to support and sustain the CAO's Portfolio Management Office (PMO) and supporting governance policies, procedures, and tools. Accomplishment of this work will require contracted subject matter expertise in portfolio management/Capital Planning Investment Control (CPIC) as well as project management and analysis and supporting tools.

The contractor shall provide technical and administrative support and oversight of projects that flow through the CAO's CPIC process to include (1) portfolio and project management support to CAO executives and managers at all levels and project managers and their respective teams, (2) portfolio and project management-related consultative and analysis services and support in the areas to include project decision making, initiation, development, execution, and closeout, and (3) PMO administration and maintenance activities to include support for the administration, operation, and maintenance of portfolio and project management support tools, project artifact repositories, and PMO governance documentation and templates.

2 Background

As a dynamic organization, the CAO continues to improve its products and services to the House community through evolutionary and revolutionary changes in its internal business processes. Over the past several years, the CAO has focused significant effort on formalizing and standardizing its project investment decision making processes through the development of CAO-wide portfolio and project management governance policies, procedures, and support tools.

Implementation and sustainment of the work associated with this statement of work will provide the mechanisms and tools to achieve the CAO Balanced Scorecard objectives: Optimize Use of Resources, Improve Information Sharing, Continuously Improve Customer Service Delivery Processes, and Improve Workforce Readiness.

3 Scope

The selected contractor will provide the necessary personnel resources to adequately staff and execute the CAO's PMO for the duration of the period of performance. PMO subject matter expertise will be required in the core disciplines of portfolio management, project management, and program/project analysis. Additionally, PMO support contractors will be expected to provide formal (infrequent) and informal (frequent) training and one-on-one support to CAO staff in the areas of portfolio and project management activities as it relates to their understanding and ability to apply CAO governance to their individual projects. Successful execution of this SOW will be measured in terms of (1) successful oversight and administration of the CAO's portfolio of planned and approved portfolio of projects and supporting governance, (2) effective development and use of portfolio and project management decision support tools and analysis that enables CAO executives and management to make informed investment decisions, and (3) the development of an informed and capable CAO project management cadre of managers and staff.

In a task executed at the option of the CAO, selected contractor will support maintenance and /or development and improvement of PMO support tools to include but not limited to ProSight Portfolios configuration utilizing

JavaScript and .Net programming. Such maintenance support shall be conducted in accordance with the Systems Development Life Cycle requirements of the CAO's PMO governance processes.

4 Description of Work/Tasks

4.1 Task 1:

4.1.1 Task 1 Description.

Provide fulltime, dedicated support and administration of the CAO's Portfolio Management Office and supporting portfolio and project management governance. Support will be comprised of but not limited to:

- Implement CAO PMO Evaluate processes and procedures to support Portfolio Management Board (PMB) and Portfolio Review Board (PRB) review and approval of Post Implementation Reviews to support continuous process improvement
- Prepare CAO leadership for weekly, quarterly and annual decision making activities to include project management reviews, annual budget formulation, quarterly unfunded review process, etc. for a portfolio of High Risk projects;
- Provide all aspects of PMB support to include meeting logistics, analysis and presentation/visualization of portfolio data in a manner that enables effective and efficient decision making
- Support the PMB in providing oversight of High Risk and/or specifically designated project implementations and providing post implementation assessments of projects as well as identifying lessons learned that should be adopted to continue portfolio management process improvements
- Support the PRB in providing oversight of Moderate and Low Risk project implementations and providing post implementation assessments of projects as well as identifying lessons learned that should be adopted to continue portfolio management process improvements
- Prepare and support PRB in assessing, prioritizing, and selecting investment opportunities
- Facilitate and support activities of Project Management (PM) Governance working groups and advisory boards that support the PMB and PRB to include:
 - Technology Advisory Board (TAB)
 - Improvement Advisory Board (IAB)
 - Selection Working Group(s)
- Provide portfolio and program analysis and recommendations to project managers and project oversight bodies at the following levels.
 - CAO high risk portfolio of projects – extensive support/level of effort (LOE)
 - CAO medium risk portfolio of projects – moderates support/LOE
 - CAO low risk portfolio projects – low to moderate support/LOE
- Develop recommendations based on Portfolio trends and indicators and project management consultation and support; present recommendations to CAO project/portfolio oversight boards and executive management
- Track CAO portfolio of projects against project plans and milestones
- Track and coordinate project milestones and artifacts with CAO project managers and tiered management review boards
- Track CAO project action items' (project review sessions, project schedules, etc.) creation and closure
- Provide Project document quality assurance (QA) support and assistance to project managers; ensures submitted project artifacts comply with CAO governance standards prior to dissemination to CAO PMO management and advisory boards and working groups; ensure exceptions to templates are approved by PRB prior to dissemination

- Synthesize CAO portfolio and project data and provide as required analysis to CAO management from project managers to executive leadership on project and portfolio health, trends, and recommendations
- Develop and maintain inventory of active CAO projects and work with PRB to determine appropriate governance levels for the projects
- Facilitate and support implementation of CAO PMO Select processes and procedures to support PMB and PRB investment prioritization, selection, and resource realignment
- Support CAO project managers in the development of project artifacts and deliverables, to include those required for all projects and those required to support people, process, and infrastructure changes as well as technology changes, which support the Systems Development Life Cycle.
- Support all administrative needs of the PMO and associated processes as needed.

4.2 Task 2

4.2.1 Task 2 Description.

Provide for the effective development and use of portfolio and project management decision support tools and analysis that enables CAO executives and managers to make informed investment decisions. Support will be comprised of but not limited to:

- Review on a semi-annual basis and recommend improvements to PMO governance policies, procedures, templates, and tools as required to support CAO decision making and project planning and execution; incorporate approved changes into applicable PMO governance and training materials
- Develop and maintain electronic PMO data repositories for past, current, and future/planned projects
- Implement CAO PMO Control processes and procedures to support PMB and PRB governance of approved investments; recommend improvements to processes and procedures and support implementation of improvement recommendations
- Conduct routine administration of the ProSight Portfolios tool, excluding change management tasks associated with Optional Task 4.
- Create ProSight portfolios, items, scorecards, maps, graphs, dashboards, etc. to facilitate PMO processes

4.3 Task 3:

4.3.1 Task 3 Description.

Develop CAO project management cadre of managers and staff in the effective use of CAO PMO governance and applicable industry best practices in portfolio and project management. Support will be comprised of but not limited to:

- Provide periodic review of CAO project management training materials and provide recommendations for update/refresh;
- Update CAO project management training materials as directed
- Provide formal project management governance training facilitation and support utilizing established CAO PM Governance concepts, policies, procedures, templates, and training materials

- Provide informal/one-on-one training to CAO cadre of project managers and their project staff; extent and frequency of informal training will vary by project team based on team maturity, experience, and prior training
- Provide informal and formal consultative support to CAO Leadership Team in portfolio and project management decision making processes and best practices that strengthen ability to support PM governance process

4.4 Task 4 (Optional Task)

4.4.1 Task 4 Description.

Support configuration change to ProSight Portfolios.

- Configuration of ProSight Portfolios in support of the Portfolio Management Office. Current configuration of ProSight implementation includes Java Script calculations and .Net tables.
- Configuration of ProSight Portfolios in support of version releases by the vendor, ProSight. Current production release is version 5.3. The CAO intends to upgrade to 6.0x during the late FY2006 – early FY2007 timeframe.
- Conduct configuration releases to ProSight Portfolios in the full Systems Development Life Cycle producing all required documentation and following project guidelines for implementation of technical change within the CAO.
- Maintain ProSight Portfolios according to the current prescribed change management activities documented in the ProSight Portfolios CM Plan.

4.5 Estimated Level of Effort

The estimated number of CAO projects to be managed on an annual basis is as follows:

- High Complexity Projects: 10
- Moderate Complexity Projects: 20
- Low Complexity Projects: 40

The estimated level of effort, per year, to support all tasks identified above is as shown below, however the House welcomes proposals for additional or different labor categories and allocations of effort among categories toward efficient contract performance.

Position	Hours/yr
Portfolio/CPIC Manager	1960
Project Manager	1960
Project Scheduler	1960
Project Analyst	3920
Analyst/Instructor Reach Back	620
ProSight Configuration Programmer (for optional Task 4)	310

4.5.1 Qualifications

Portfolio/CPIC Manager

- Multiple years experience in providing senior level, strategic support to Government organizations
- Experience standing up and operating investment review boards and portfolio management, and/or experience in supporting executive decision making
- Experience in working with CPIC within the federal government, experience with multiple agencies helpful
- Experience in utilizing portfolio management tools to support executive decision making, ProSight Portfolios extremely helpful
- Experience in operating Investment Review processes for organizations, and/or experience in supporting executive decision making;
- Experience interacting with senior and mid-level executives, providing guidance, training, and facilitating working sessions;
- Experience working one-on-one with project managers
- Experience developing business case justifications
- Experience developing and conducting training both in group sessions and one-on-one
- Experience utilizing ProSight Portfolios required.

Project Manager

- Senior level experience in leading project management activities of various complexity levels within the federal government through all phases of a project's lifecycle (e.g., project approval, initiation, requirements, solution design, solution acquisition, solution assessment, solution deployment, and operations and maintenance).
- Experience preparing for and presenting project management reviews/project status reporting to stakeholders and senior management
- Experience in project closeout and evaluation activities
- Experience in participating in investment review boards or comparable executive-level decision making/portfolio management processes within the federal government (preferable) and/or large commercial organizations
- Experience in working with CPIC processes within the federal government

Project Scheduler

- Strong experience in developing project schedules, Gantt charts, work breakdown structures (WBS), etc., using Microsoft Project
- Experience in managing schedules of multiple projects
- Experience working one-on-one with project managers
- Knowledge of good project management principles
- Experience working on Information Technology and non-IT project teams

Project Analyst

- Experience serving on project management teams of various levels of complexity
- Experience interacting with senior and mid-level executives, providing guidance, training, and facilitating working sessions related to project/portfolio management
- Experience working one-on-one with project managers and project teams in project planning, execution, and closeout activities
- Experience developing and reviewing business case justifications
- Experience developing project artifacts to include Systems Development Life Cycle documentation
- Experience in working with CPIC within the federal government, experience with multiple agencies helpful
- Strong analytical abilities that allow for project, program, and portfolio level analysis and recommendations to occur
- Experience developing conducting training both in group sessions and one-on-one
- Experience in analyzing Project Portfolios (maps, graphs, etc.)
- Experience utilizing and administrating ProSight Portfolios required.

ProSight Configuration/Programmer (for Optional Task 4)

- Experience utilizing ProSight Portfolios, and configuring ProSight Portfolios required.
- Experience with IT Configuration Management best practices and Project Management including management of projects governed by a Systems Development Life Cycle (SDLC)
- JavaScript programming experience required
- .Net programming experience required

5 Contract Deliverables

Contract project status reporting deliverables shall be provided on a recurring basis for the life of the contract at the frequencies/timeframes as stipulated, below:

- **Weekly Task Status Report.** The contractor shall submit to the COR a weekly summary report on work accomplished during the week, problems and resolutions and any outstanding problems. This report may also include inputs necessary for the CAO weekly Status Report.
- **Monthly Status Report.** The Contractor shall submit a monthly status report summarizing work accomplished. The report shall be delivered within 10 working days of the close of every month. The report shall be organized by Task and shall describe the status of each major effort within each task. The contractor shall include a description of major activities expected to be completed in the next month. The contractor shall identify any issues or concerns on contract execution with recommended corrective actions. The monthly status report shall include tracking, in table format, of hours worked by contractor staff. Hours worked shall be tracked by task and shall include original estimated hours, hours to date, hours during the reporting period and remaining hours. The status report shall include tracking of funding for the contract by task. Tracking shall include, at a

minimum, initial estimated contract value, funding provided to date, cumulative funds expended to date, funds expended during the reporting period, and remaining balances. The contractor shall include a table indicating invoices submitted with date submitted, amount and date paid. Within 15 days after contract award the contractor shall submit a draft monthly status report for review and approval by the COR.

- **Status Briefings.** The Contractor shall prepare formal status briefings on the efforts being conducted. These briefings will be attended by the COR and other CAO managers and staff as deemed appropriate. Routine briefings shall be held monthly. The contractor shall be responsible for the coordination and scheduling of the monthly status briefing. The briefing shall summarize the contract status by task and provide financial status. The contractor shall prepare ad-hoc briefings as needed to support the objectives of the efforts described. All briefings shall be done in MS PowerPoint format. At the COR's discretion, electronic submission, review, and feedback of Status Briefing materials may be substituted for conduct of actual monthly briefings.

Task deliverables in the form of documentation and work breakdown structures shall be developed and maintained in Microsoft (MS) Office 2003 and MS Project 2000 format. Deviations from these formats must be approved in advance by the COR. Task deliverables shall be developed on a time and materials basis and include but not be limited to:

- CAO project management training materials and delivery (informal/over-the-shoulder and formal)
- CAO project management governance documentation and templates
- Systems Development Life Cycle documentation as required for updates to the ProSight Portfolios implementation
- Portfolio trend and recommendation reports
- Project management consultation and recommendations (as requested)
- PMO action item tracker
- PMO data repository for past, current, and future/planned projects
- Master Project Inventory (approved and proposed projects)
- Master Project Schedule with key milestones (MS Project format)
- Portfolio and project specific analysis and recommendations
- PMB and PRB meeting materials (briefings, etc.)

All deliverables and work papers produced during the performance of this work shall become the property of the U.S. House of Representatives.

6 Contractor Capability Requirements

The U.S. House of Representatives will assign a Contracting Officer Representative (COR) for overall contract monitoring and coordination.

The House will provide necessary work space and equipment for the contractor to perform the work.

The Contractor shall provide staff with the portfolio and project management/analysis experience/skill sets, labor categories, and education commensurate with the requirements of the tasks identified. The Contractor may propose other skill sets and may propose more than one Skill Set/Labor Category be used to complete specific tasks as applicable. Resumes must be provided for all proposed staff along with a commitment of their availability for this project to commence approximately September 2006. The House reserves the right to interview/screen proposed staff.

In the course of performing this contract, the contractor will necessarily be informed of House plans for future procurements. The House does not intend to exclude the firm awarded a contract under this solicitation from participating in future procurements. However, employees of the successful contractor will be required to execute Affirmations of Non-Disclosure, especially in regards to the future procurements that the contractor employees may encounter while working on this project. Contractor proposals must include the contractor's approach to maintaining confidentiality of procurement-sensitive information and specific approaches to maintaining independence between respective operating and marketing functions or branches.